



**Department of Health Care Services
Children's Medical Services Network**



Case Notes

User Manual (Step-by-Step)

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OVERVIEW

The CMS Net Narratives module is converted to the CMS Web system and renamed Case Notes. However, the terminology *narrative* and *case note* can be used synonymously the way *client* and *patient* terminology is used.

Listed are features and functionalities of the Case Notes module:

- Add new case notes
- Use subject codes for each selected subject description
- Read and print existing CMS Legacy narratives and case notes from a .PDF format
- Search by using a criteria with multiple patients, users, and subject descriptions
- Authors can edit or delete case notes the same day they're created
- Make corrections to case notes anytime after the first day. The new correction case note will be associated to the original corrected case note that displays with a strikethrough format (example: ~~strikethrough~~).
- Transfer case notes between patients within the same county when case notes are known to have been entered in the wrong patient. The transfer feature must be requested through State system administrators.
- Attach a hyperlink of case notes to a web message.
- Flag a case note as an error. This feature must be requested through State system administrators.
- View narratives from the Case Notes module and vice versa – view case notes from the CMS Net Narratives module.

1 Case Notes Module

1.1 CASE NOTE TYPES AND DEFINITIONS

There are three types of case notes and they are listed and defined as follows:

1. **Manually entered free-text** – A case note that is created by using the 'Add New' function
2. **Automatic case note** – A case note that is pre-populated with some system generated information, but the user has the ability to enter free-text. These case notes occur after certain events like a case closure, issued letter, or authorized SAR.
3. **System-generated case note** – A case note that is created by the system and is automatically filed without the user's visual knowledge. Users do not have the opportunity to enter additional text to it at the time it is saved.

[Please see Appendix A to view the case notes subject descriptions for manually entered free-text case notes.](#)

1.2 ACCESSING CASE NOTES

- Step 1.** Access the Case Notes module by hovering the mouse pointer over the 'CCS Modules' option to display the menu drop-down list. Click on the 'Case Notes' option as shown in Figure 1-1.



Figure 1-1, Accessing Case Notes

2 Search Case Notes

2.1 CASE NOTES DEFAULT SEARCH SCREEN

Figure 2-2 displays the default case notes search screen. A common way to search for case notes is by date and patient. However, there are multiple ways to search for case notes by using the Advanced Search options which allows searches by a patient, user, and specific subject.

A new feature to be aware is the 'Add new case note' button. It is used for adding new case notes to a patient record that is listed on the patient list.

Home Page | CCS Modules | Provider | Reports | Administration

Case Notes

Search Case Note

Search - Case Notes

Required fields are marked in *. Patient or User is required.

ENTER DATE RANGE AND TYPE

Begin Date * 10/07/2008 End Date * 11/06/2008

SEARCH FOR PATIENT

Search Client

Patient Name	CCS#	CII	SSII	DOB	Gender	County
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select

New feature
Add new case note button

+ Advanced Search Options

Add new case note Search Reset

Figure 2-2, Search User Screen

Figure 2-3 displays the Advanced Search options where case notes can be searched by user, subject description, and include case notes marked as an error.

A new feature to be aware of is the placement of the 'Display error and deleted case notes' check box. It is included in the Advanced Search options.

Case Notes

Search Case Note

Search - Case Notes

Required fields are marked in *. Patient or User is required.

ENTER DATE RANGE AND TYPE

Begin Date * End Date *

SEARCH FOR PATIENT

Search Client

☐ Patient Name CCS# CII SSII DOB Gender County

Click here to expand the Advanced Search options

☒ **Advanced Search Options**

(Combination of fields may be used, although not required)

Search User

☐ User Name County Regional Office User Status

Select Subject

☐ Group Description Subject Code Subject Line

New feature
Case note error and deleted filter checkbox displays in the Advanced Search options

☒ **Display error and deleted case notes:**

Figure 2-3, Advanced Search options

2.1.1 Search for patient by name

- Step 1.** Enter the patient name in the 'Patient Name' field. Partial names are allowed. Press <ENTER> key or click the 'Find' button.
A pop-up screen appears and displays the search results.
- Step 2.** Select the patient and click the 'Continue' button. The selected patient is added to the patient list.

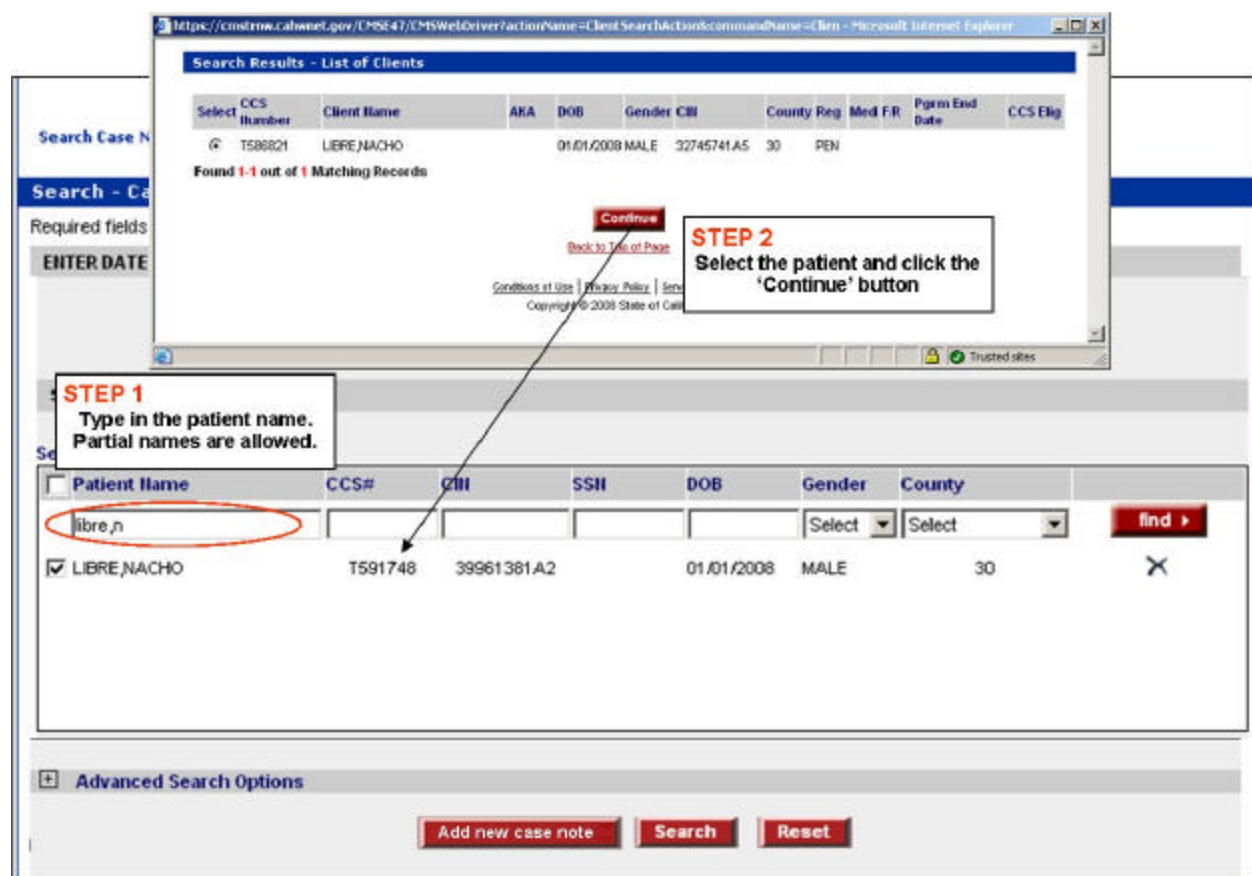


Figure 2-4, Search for patient

A new feature to be aware of is the date range recalculating to the very first and most recent entry dates of existing case notes and narratives for the selected patient(s).

Case Notes

Search Case Note

Search - Case Notes

Required fields are marked in *. *Patient or User is required.*

ENTER DATE RANGE AND TYPE

Begin Date *

End Date *

SEARCH FOR PATIENT

Search Client

<input type="checkbox"/> Patient Name	CCS#	CIN	SSH	DOB	Gender	County	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select ▼	Select ▼	find ▶
<input checked="" type="checkbox"/> LIBRE,NACHO	T591748	39961381A2		01/01/2008	MALE	30	✕

+ Advanced Search Options

Add new case note
Search
Reset

New feature

When a patient is added to the patient list, the system recalculates the date range to display the very first and most recent entry dates of existing case notes and narratives for the patient.

Figure 2-5, Date range is recalculated based on selected patient(s)

2.1.2 Search for patient by unique identifiers – CCS, CIN, SSN

- Step 1.** Enter the CCS# and press the <ENTER> key. If there is an exact match, the system adds the patient to the patient list. This works similarly when searching by CIN or SSN.

The screenshot shows the 'Case Notes' search interface. At the top, there's a 'Search Case Note' section. Below it, a 'Search - Case Notes' header is followed by a message: 'Required fields are marked in *. Patient or User is required.' The 'ENTER DATE RANGE AND TYPE' section contains 'Begin Date' (07/23/2008) and 'End Date' (11/15/2008). The 'SEARCH FOR PATIENT' section has a 'Search Client' label. A table with columns: Patient Name, CCS#, CIN, SSN, DOB, Gender, County, and a 'find' button. The 'CCS#' column has a red circle around the value '4056355'. A blue arrow points from this circle to the 'SPECHT,BOY' row in the table. A callout box labeled 'STEP 1' says 'Enter a unique identifier such as CCS#, CIN, or SSN'. At the bottom, there are 'Add new case note', 'Search', and 'Reset' buttons.

Patient Name	CCS#	CIN	SSN	DOB	Gender	County	
<input type="checkbox"/> LIBRE,NACHO	T586821	32745741A5		01/01/2008	MALE	30	X
<input checked="" type="checkbox"/> SPECHT,BOY	4056355	31927012A5		01/01/2008	MALE	30	X

Figure 2-6, Search by unique identifier – CCS, CIN, or SSN

2.1.3 Search for patient using combination – DOB, Gender, and County

- Step 1.** Enter a DOB, select Gender, and County. Press <ENTER> key or click the 'Find' button.
A pop-up screen appears and displays the search results.
- Step 2.** Select the patient and click the 'Continue' button. The selected patient(s) are added to the patient list.

The screenshot displays the CMS Case Notes search interface. At the top, a table titled "Search Results - List of Clients" shows two matching records:

Select	CCS Number	Client Name	AKA	DOB	Gender	CIH	County	Reg	Med F/R	Pgrm End Date	CCS Elig
<input type="radio"/>	T586818	ALLEN,BOY		01/01/2008	MALE	34927012A2	10	PEN	E	12/31/2008	
<input checked="" type="radio"/>	4056358	DOUGHTY,BOY		01/01/2008	MALE	35927012A1	10	CLO	E	12/31/2008	9N MC ONLY

Found 1-2 out of 2 Matching Records

STEP 2
Select the patient and click the 'Continue' button

STEP 1
Combination search—enter DOB, Gender, and County

The search form at the bottom includes the following fields:

- Begin Date: 09/22/2008
- End Date: 10/09/2008
- Search Client:

Patient Name	CCS#	CIH	SSN	DOB	Gender	County	find
<input type="checkbox"/> LIBRE,NACHO	T586821	32745741A5		01/01/2008	Male	Fresno	<input type="button" value="find"/>
<input checked="" type="checkbox"/> SPECHT,BOY	4056355	31927012A5		01/01/2008	MALE	30	<input type="button" value="X"/>
<input checked="" type="checkbox"/> ALLEN,BOY	T586818	34927012A2		01/01/2008	MALE	10	<input type="button" value="X"/>
<input checked="" type="checkbox"/> DOUGHTY,BOY	4056358	35927012A1		01/01/2008	MALE	10	<input type="button" value="X"/>

Advanced Search Options

Buttons: Add new case note, Search, Reset

Figure 2-7, Combination search – DOB, Gender, and County

This example continues in the next section [3.2 Case Notes Search Results](#) screen.

2.2 CASE NOTES SEARCH RESULTS SCREEN

Listed are tables that identify certain case note indicators and use of hyperlinks.

Table 3-1, Case Note Indicators

Indicator Name	Indicator Definition and Details
1. **DRAFT**	This indicates the case note was entered today and is subject to change by the creator anytime today. This is useful when users do take action based on a case note because they need to keep in mind the content of the case note may change will may affect the action they're taking.
2. **TCN**	TCN stands for transferred case note. When users enter a case note or narrative in the wrong patient record, they can request the County or State system administrators to transfer the case note to the correct patient within the same legal county.
3. **CORRECTION**	This indicates the original case note had corrections made to it.
4. **ERROR**	This indicates the case note was entered error and the original creator is no longer around to make a correction. Users can request the County or State system administrators to flag a case note as an error.

Table 3-2, Hyperlinks with Case Notes

Module	SAR / Letter Status	Hyperlink Action
SAR	<ul style="list-style-type: none"> Authorized SAR Cancelled SAR 	Display .PDF format of SAR
SAR	<ul style="list-style-type: none"> Pending SAR Denied SAR Request Approval Approved-Y Approved-N 	<p>Navigate to the SAR module and display the SAR.</p> <p>There will be a confirmation message to ask if the user wants to navigate to the SAR module and will exit the Case Notes module.</p>
Web Correspondence	<ul style="list-style-type: none"> Sent letter Cancelled letter 	Display .PDF format of letter

New feature:

By default, case notes are sorted in reverse chronological order – newest to oldest. However, the case notes can be sorted by clicking on the column headings. Hard copy printouts are based on sort order when printing from the search results screen.

- Step 1.** Click the 'Search' button to begin searching for the case notes.
The search results screen appears with the matching records.

California Home DHCS Home DHCS Organization Wednesday, October 22, 2008

Training
Caring for Children with Special Medical Needs...

Contact Us | Help | Logout

Web Messages(0)

Home Page | CCS Modules | Provider | Reports | Administration

Case Notes

Search Case Note

Search - Case Notes

Required fields are marked in *. Patient or User is required.

ENTER DATE RANGE AND TYPE

Begin Date * 07/23/2008 End Date * 11/15/2008

SEARCH FOR PATIENT

Search Client

<input type="checkbox"/> Patient Name	CCS#	CIH	SSN	DOB	Gender	County	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	01/01/2008	Male	Fresno	<input type="button" value="find"/>
<input checked="" type="checkbox"/> LIBRE,NACHO	T586821	32745741A5		01/01/2008	MALE	30	<input type="button" value="X"/>
<input checked="" type="checkbox"/> SPECHT,BOY	4056355	31927012A5		01/01/2008	MALE	30	<input type="button" value="X"/>
<input checked="" type="checkbox"/> ALLEN,BOY	T586818	34927012A2		01/01/2008	MALE	10	<input type="button" value="X"/>
<input checked="" type="checkbox"/> DOUGHTY,BOY	4056358	35927012A1		01/01/2008	MALE	10	<input type="button" value="X"/>

☒ Advanced Search Options

STEP 1
Click the 'Search' button to start searching for case notes

Figure 3-8, Begin searching for case notes

On the Case Note results screen, there are several new features:

1. 'Select All' check box
2. Case Notes subject description hyperlink
3. Status column
4. Page selectors
5. 'Transfer case note' button

Case Notes								
Notes								
<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>	11/05/2008	App-Letter1 Corres# 984852-2008	Application Status: 1st Letter Sent Status: Sent	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008		Test narrative entry date	T591749	Munky,Drunkn Curious	34	Phavisith,Sone	Draft
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 2nd Letter Sent Status: Sent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	Draft
<input type="checkbox"/>	10/06/2008	App-Letter2	Application Status: 2nd Letter sent	T591749	Munky,Drunkn Curious	33	Cardona Technician,Margarita	TCN
<input type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	Corrected
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Munky,Drunkn Curious	33	Paredes Ccs Supervisor,Caridad	Deleted
<input type="checkbox"/>	07/30/2008	SAR-Authorzd SAR# 97014418800	Service Authorization status: Authorized	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	Error
191 Records found, displaying 1 to 20. [First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]								
				Back	Print	Attach	Transfer case note	

Figure 2-9, Search results screen

3 View / Print Selection

Step 1. Select the case note to view by placing a check mark in the check box.

Step 2. Click the 'Print' button

Case Notes

Search Case Note

Search Results - Case Notes

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 1st Letter: Sent Status: Sent	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008		Test narrative entry date	T591749	Munky,Drunkn Curious	34	Phavisith,Sone	Draft
<input checked="" type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 2nd Letter: Sent Status: Sent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	Draft
<input checked="" type="checkbox"/>	10/06/2008	App-Letter2	Application Status: 2nd Letter: sent	T591749	Munky,Drunkn Curious	33	Cardona Technician,Margarita	TCN
<input checked="" type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	Corrected
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Munky,Drunkn Curious	33	Paredes Ccs Supervisor,Caridad	Deleted
<input type="checkbox"/>	07/30/2008	SAR-Authorzd SAR# 97014418800	Service Authorization status: Authorized	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	Error

191 Col [P] and, displaying 1 to 20.
7, 8 [Next/Last]

STEP 1
Select the case notes to view by placing a check mark in the check box

STEP 2
Click the 'Print' button

Back Print Attach Transfer case note

Figure 3-10, Select case notes to view

Step 3. Click the printer icon to print the selected case notes. **Note:** This printing option may vary depending on the .PDF software program and version. The example in Figure 3-11 uses Acrobat Reader 8.0.

The case notes format has a new design as shown in Figure 3-11.

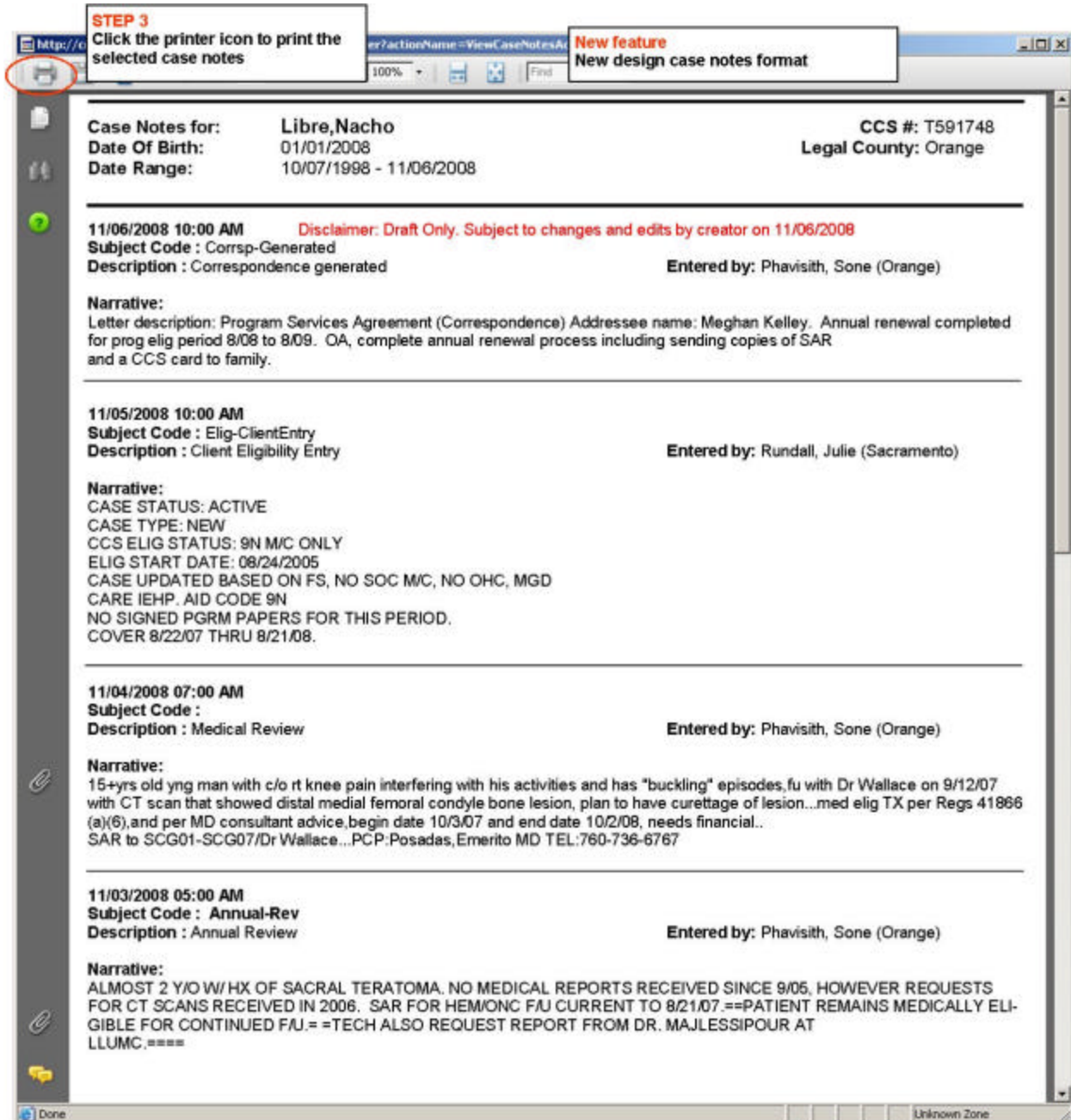


Figure 3-11, PDF of selected case notes

4 Add New Case Note

Using the 'Add New' option creates a manual free-text case note.

4.1 ADD CASE NOTE TO FIRST PATIENT LISTED

Step 1. Add and select a patient on the patient list

Step 2. Click the 'Add new case note' button

The screenshot displays the 'Case Notes' application interface. At the top, there is a 'Search Case Note' header. Below it, a 'Search - Case Notes' section contains a message: 'Required fields are marked in *. Patient or User is required.' Underneath, there is a section titled 'ENTER DATE RANGE AND TYPE' with 'Begin Date' set to 07/23/2008 and 'End Date' set to 11/05/2008. Below this is a 'SEARCH FOR PATIENT' section. A callout box labeled 'STEP 1' points to the 'Add a patient to the patient list' text. The patient list table has columns: Patient Name, CCS#, CMI, SSN, DOB, Gender, and County. The first patient listed is 'LIBRE, NACHO' with CCS# T591748, CMI 39961381A2, DOB 01/01/2008, Gender MALE, and County 30. A callout box labeled 'STEP 2' points to the 'Add new case note' button at the bottom of the interface. The bottom of the interface also features 'Advanced Search Options', 'Add new case note', 'Search', and 'Reset' buttons.

Patient Name	CCS#	CMI	SSN	DOB	Gender	County
LIBRE, NACHO	T591748	39961381A2		01/01/2008	MALE	30

Figure 4-12, Add new dialog box

- Step 3.** Select a subject description using the drop-down list. For this example, select 'Application – other information or issues' subject. The system automatically assigns the associated subject code (App-misc) which is read-only.
- Step 4.** Enter a more descriptive description in the 'Other' text box.
- Step 5.** Type in the free-text narrative.
- Step 6.** Click the 'Save' button and the system saves the new case note.

Case Notes

[Search Case Note](#) | [Add New](#) | [Edit/Delete](#)

Case Notes

Required fields are marked in *

CLIENT INFORMATION

Client Name: NACHO LIBRE CCS Number: T591748 Date Of Birth: 01/01/2008 CI#: 39961381A2 Gender: MALE	F/R Elig: Med Elig Status: Diagnostic Only: CCS Elig Status: County: ORANGE	Reg Status: PENDING Application Status: 1ST LETTER SENT PSA Status: Program Begin Date: Program End Date:
--	--	--

STEP 4
 Enter a more descriptive subject description

Entry Date: 11/18/2008

Subject: App-misc

Other: Application is out-dated

Narrative: *

STEP 3
 Select the subject description

Application - other information or issues

The patients application contains information for the former county. A new application has been sent to the family to complete.

STEP 5
 Enter free text in the narrative section

STEP 6
 Click the 'Save' button

Back
Save

Figure 4-13, Confirm adding a new case note to the patient record

4.2 DRAFT CASE NOTE

Step 1. Select the draft case note by placing a check mark in the check box.

Step 2. Click the 'Print' button.

The screenshot displays the 'Case Notes' application interface. At the top, there is a 'Search Case Note' field. Below it, a blue banner contains the text 'STEP 1 Select the new case note which has the Draft status'. The main area features a table with columns: Date, Subject Code, Subject, CCS#, Client Name, County, Entered By, and Status. A single record is listed with a checked checkbox in the first column, indicating it is selected. The record details are: Date: 11/18/2008, Subject Code: App-misc, Subject: Application is out-dated, CCS#: T591748, Client Name: Libre, Nacho, County: 30, Entered By: Phavisith, Sone, and Status: Draft. Below the table, a message states '1 Records found'. At the bottom, there are four buttons: Back, Print, Attach, and Transfer case note. The 'Print' button is highlighted with a red oval. A box labeled 'STEP 2 Click the 'Print' button' points to the 'Print' button.

	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input checked="" type="checkbox"/>	11/18/2008	App-misc	Application is out-dated	T591748	Libre, Nacho	30	Phavisith, Sone	Draft

1 Records found

Back Print Attach Transfer case note

STEP 2
Click the 'Print' button

Figure 4-14, Select the draft case note to view

- Step 3.** Click the printer icon to print the selected case notes. **Note:** This printing option may vary depending on the .PDF software program and version. The example in Figure 4-15 uses Acrobat Reader 8.0.

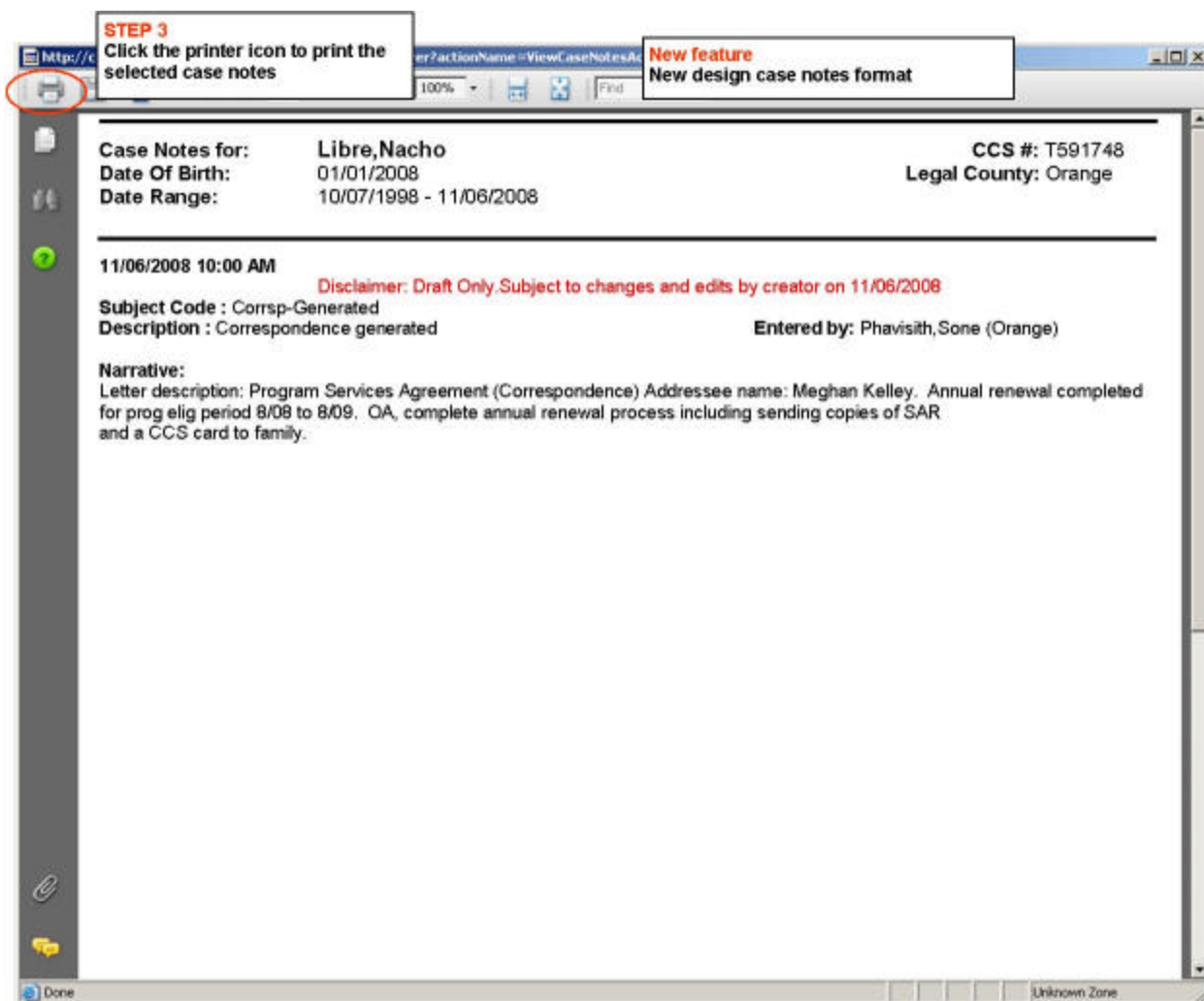


Figure 4-15, Draft disclaimer is displayed on all new case notes

5 Edit a Case Note

Step 1. Click on the subject description hyperlink.

Case Notes

Search Case Note

Search Results - Case Notes

STEP 1
 Click on the subject description hyperlink

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>	11/05/2008	App-Letter1 Corres# 984852-2008	Application Status: 1st Letter: Sent Status: Sent	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	Misc	Test narrative entry date	T591749	Libre,Nacho	34	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 896576-2008	Application Status: 2nd Letter: Sent Status: Sent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	Draft
<input type="checkbox"/>	10/06/2008	App-Letter2	Application Status: 2nd Letter sent	T591749	Munky,Drunkn Curious	33	Cardona Technician,Margarita	TCN
<input type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	Corrected
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Munky,Drunkn Curious	33	Paredes Ccs Supervisor,Caridad	Deleted
<input type="checkbox"/>	07/30/2008	SAR-Authorzd SAR# 97014418800	Service Authorization status: Authorized	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	Error

191 Records found, displaying 1 to 20.
 [First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]

Figure 5-16, Click on subject description hyperlink

Figure 5-17 displays the preview screen of the case note.

Step 2. Click on the 'Edit' button to be redirected to the edit case notes screen.

Case Notes

[Search Case Note](#)

Case Notes

Required fields are marked in *

CLIENT INFORMATION			
Client Name:	NACHO LIBRE	F/R Elig:	Reg Status: PENDING
CCS Number:	T591748	Med Elig Status:	Application Status: 1ST LETTER SENT
Date Of Birth:	01/01/2008	Diagnostic Only:	PSA Status:
CIII:	39961381A2		Begin Date:
Gender:	MALE		End Date:

Preview

1 / 10 81.3% Find

Case Notes for: Libre, Nacho CCS #: T591748
 Date Of Birth: 01/01/2008 Legal County: Orange
 Date Range: 10/07/1998 - 11/06/2008

11/06/2008 10:00 AM
 Subject Code : Misc
 Description : Test narrative entry date Entered by: Phavisith, Sone (Orange)

Narrative:
 Test testing the narrative entry date for this case note. Test testing the narrative entry date for this case note.
 This case note will be edited. The correction feature has been merged with the edit feature. The strikethrough format still displays for edits made to non-draft case notes.

*Comments are required when using 'Flag as error'

Comments: *

STEP 2
 Click on the 'Edit' button

Back Edit Delete Print Attach Flag as error

Figure 5-17, Case notes preview screen

- Step 3.** Replace the entire original narrative with a new narrative
- Step 4.** Click the 'Save' button. A dialog box will appear to confirm the correction. The system returns to the preview screen with the updated case note.

Case Notes

[Search Case Note](#)

Case Notes

Required fields are marked in *

CLIENT INFORMATION

Client Name:	NACHO LIBRE	F/R Elig:	PENDING
CCS Number:	T591748	Med Elig Status:	Application Status: 1ST LETTER SENT
Date Of Birth:	01/01/2008	Diagnostic Only:	PSA Status:
CI#:	39961381A2	CCS Elig Status:	Program Begin Date:
Gender:	MALE	County:	ORANGE
			Program End Date:

CASE NOTE DETAILS

Entry Date: 11/18/2008

Subject : Other information or issues ▼

Other:

Narrative :

This are my corrections to the case note. These corrections were made after the day it was entered. The original entry displays with the strikethrough format.

STEP 3

Replace the original narrative entry with some new text.

STEP 4

Click the 'Save' button

Back
Save

Figure 5-18, Save the edits made to the case note

Figure 5-19 displays the replacement case note with the correction indicator.

Case Notes

[Search Case Note](#)

Case Notes

Required fields are marked in *

CLIENT INFORMATION

Client Name: NACHO LIBRE	F/R Elig:	Reg Status: PENDING
CCS Number: T591748	Med Elig Status:	Application Status: 1ST LETTER SENT
Date Of Birth: 01/01/2008	Diagnostic Only:	PSA Status:
Clt: 39961381A2	CCS Elig Status:	Program Begin Date:
Gender: MALE	County: ORANGE	Program End Date:

Preview

Case Notes for: Libre,Nacho
 Date Of Birth: 01/01/2008
 Date Range: 10/07/1998 - 11/06/2008

CCS #: T591748
 Legal County: Orange

11/18/2008 1:00 PM
Subject Code : Misc
Description : Test narrative entry date

Correction / Draft

Entered by: Phavisith,Sone (Orange)

Narrative:
 This are my corrections to the case note. These corrections were made after the day it was entered. The original entry displays with the strikethrough format.

11/06/2008 10:00 AM
Subject Code : Misc
Description : Test narrative entry date

Corrected

Entered by: Phavisith, Sone (Orange)

Narrative:
~~Test testing the narrative entry date for this case note. Test testing the narrative entry date for this case note.~~
~~This case note will be edited. The correction feature has been merged with the edit feature. The strikethrough format still displays for edits made to non draft case notes.~~

*Comments are required when using 'Flag as error'

Back
Edit
Delete
Print
Attach
Flag as error

Figure 5-19, Preview display of corrected case note

If edits are made to a *draft* case note, the replacement narrative displays only. The original narrative is over-written.

6 Send via Web Message

Case notes can be sent to other users in any county. Users can attach a hyperlink of a case note to a Web Message.

- Step 1.** Select the case note(s) to attach to a web message.
Step 2. Click the 'Attach' button. A web message pop-up screen appears with the selected case notes attached.

Case Notes

Search Case Note

Search Results - Case Notes

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 1st Letter Sent Status: Sent	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008		Test narrative entry date	T591749	Munky,Drunkn Curious	34	Phavisith,Sone	Draft
<input checked="" type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 2nd Letter Sent Status: Sent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	Draft
<input checked="" type="checkbox"/>	10/06/2008	App-Letter2	Application Status: 2nd Letter sent	T591749	Munky,Drunkn Curious	33	Cardona Technician,Margarita	TCN
<input checked="" type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	Corrected
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Munky,Drunkn Curious	33	Paredes Ccs Supervisor,Caridad	Deleted
<input type="checkbox"/>	07/30/2008	SAR-Authorzd SAR# 97014418800	Service Authorization status: Authorized	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	Error

191 Correspondence [First/Prev] 1 [Next/Last]

STEP 1
Select the case notes to view by placing a check mark in the check box

STEP 2
Click the 'Attach' button

Back Print Attach Transfer case note

Figure 6-20, Select case notes to attach to a Web Message

Please refer to the [Web Message user manual](#) on how to send, receive, and read Web Messages.

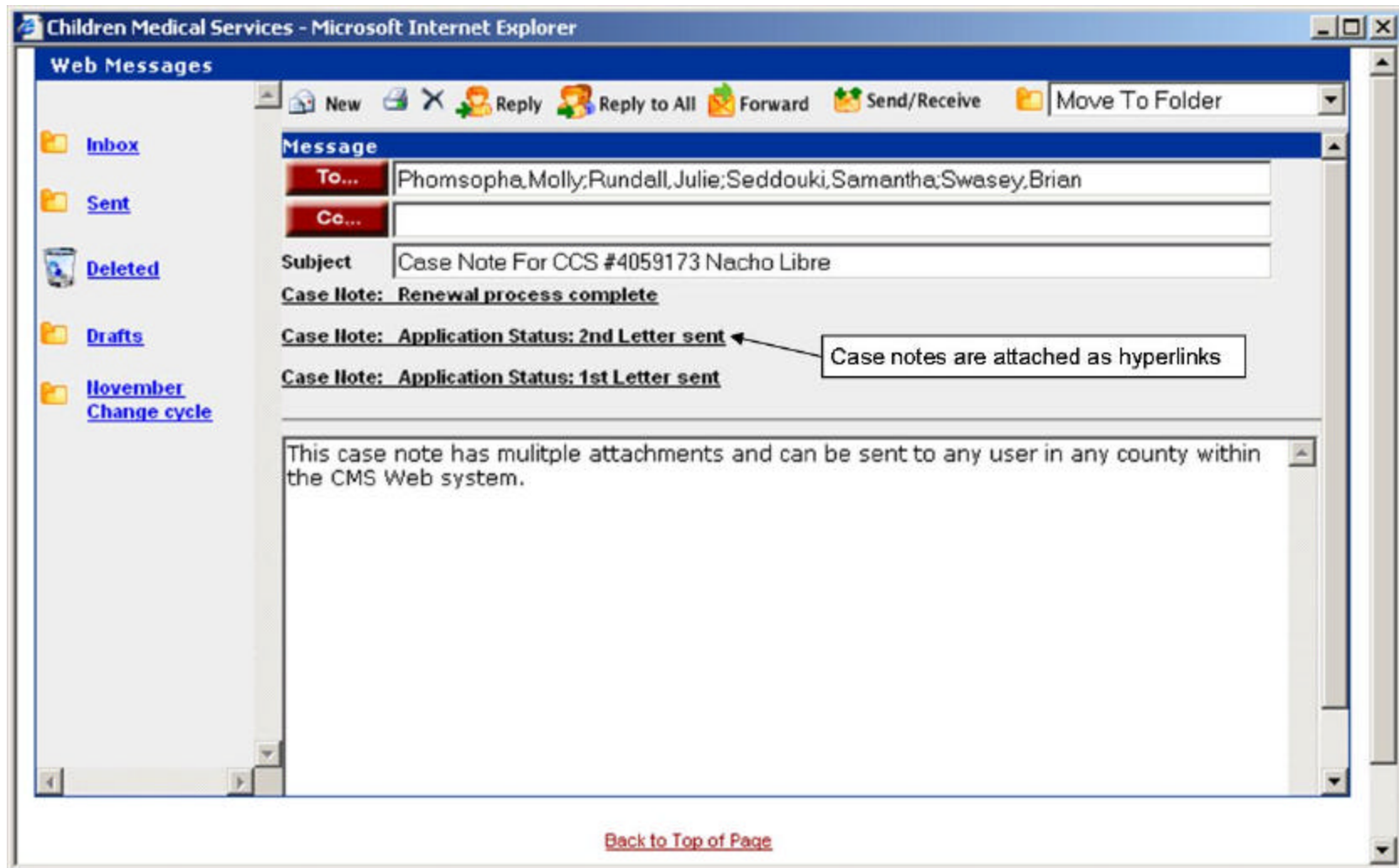


Figure 6-21, Attaching case notes to a web message

Figure 6-22 displays the case note when the attached case note hyperlink is clicked.

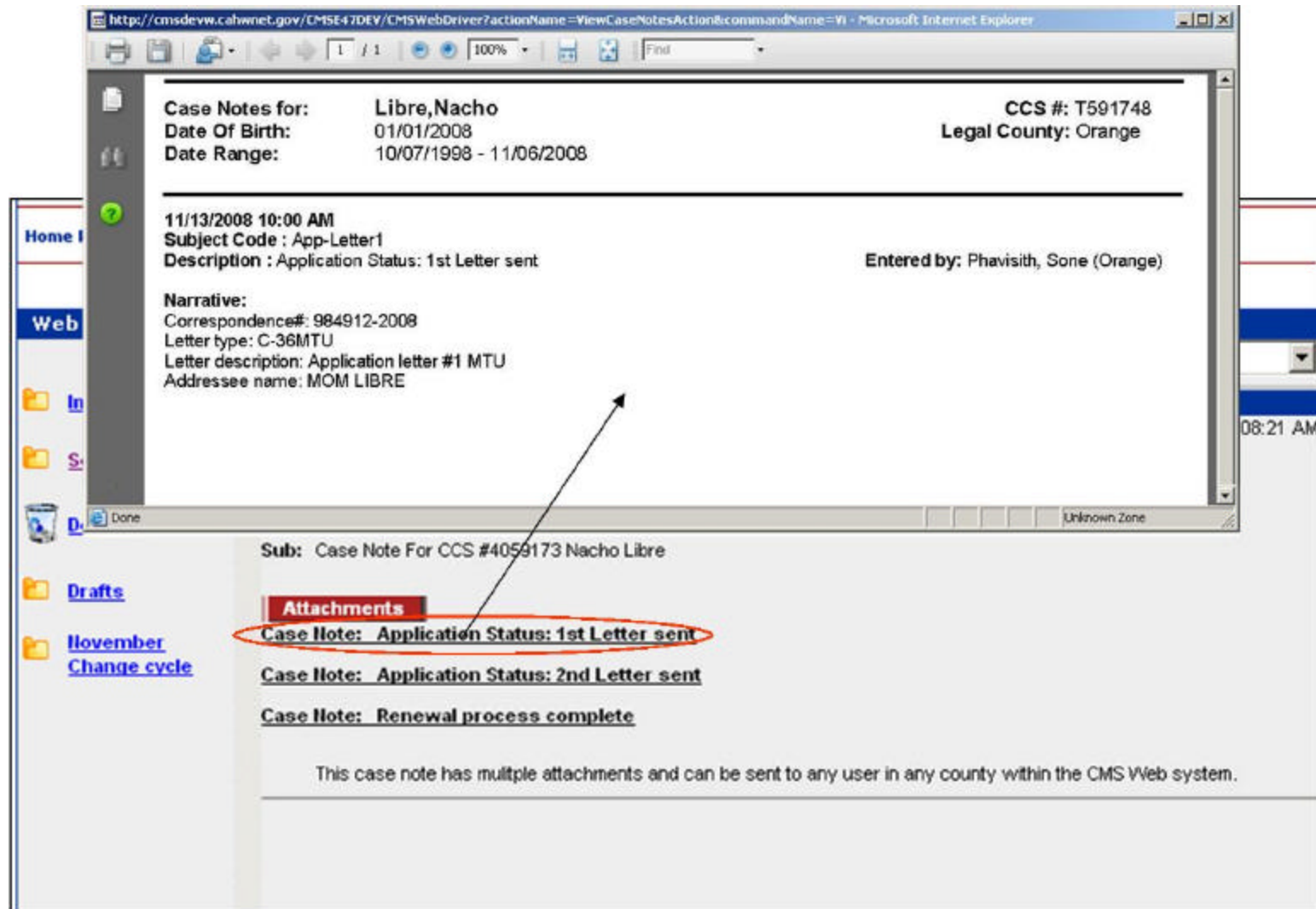


Figure 6-22, View a case note attachment

7 Delete Case Note

Case notes can be deleted the same day they're created. Case notes can be deleted by the Creator only and must be done one at a time.

Step 1. Click the subject description hyperlink of the draft case note.

Case Notes

Search Results - Case Notes

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>	11/05/2008	App-Letter1 Corres# 984852-2008	Application Status: 1st Letter Sent Status: Sent	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	Misc	Test narrative entry date	T591749	Munky,Drunkn Curious	34	Phavisith,Sone	Draft
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 2nd Letter Sent Status: Sent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	Draft
<input type="checkbox"/>	10/06/2008	App-Letter2	Application Status: 2nd Letter sent	T591749	Munky,Drunkn Curious	33	Cardona Technician,Margarita	TCN
<input type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	Corrected
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Munky,Drunkn Curious	33	Paredes Ccs Supervisor,Caridad	Deleted
<input type="checkbox"/>	07/30/2008	SAR-Authorzd SAR# 97014418800	Service Authorization status: Authorized	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	Error

191 Correspondence Records found, displaying 1 to 20.
[\[First/Prev\]](#) [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#), [8](#) [\[Next/Last\]](#)

Back
Print
Attach
Transfer case note

Figure 7-23, Select case note to edit

The preview screen appears and displays the draft case note. This forces the user to see the narrative of the case note prior to deleting. *System-generated case notes cannot be deleted such as letters and SAR case notes.*

- Step 2.** Click the 'Delete' button. The 'Delete' button appears if the case note status is draft and if the current user is the Creator of the case note.

Case Notes

Search Case Note

Case Notes

Required fields are marked in *

CLIENT INFORMATION

Client Name:	NACHO LIBRE	F/R Elig:		Reg Status:	PENDING
CCS Number:	T591748	Med Elig Status:		Application Status:	1ST LETTER SENT
Date Of Birth:	01/01/2008	Diagnostic Only:		PSA Status:	
CIB:	39961381A2	CCS Elig Status:		Program Begin Date:	
Gender:	MALE	County:	ORANGE	Program End Date:	

Preview

1 / 10 | 81.3% | Find

Case Notes for: Libre, Nacho CCS #: T591748
 Date Of Birth: 01/01/2008 Legal County: Orange
 Date Range: 10/07/1998 - 11/06/2008

11/06/2008 10:00 AM **Disclaimer: Draft Only. Subject to changes and edits by creator on 11/06/2008**
 Subject Code : Misc
 Description : Test narrative entry date Entered by: Phavisith, Sone (Orange)

Narrative:
 Test testing the narrative entry date for this case note. Test testing the narrative entry date for this case note.
 This case note will be edited. The correction feature has been merged with the edit feature. The strikethrough format still displays for edits made to non-draft case notes.

Comments: *

*Comments are required when using 'Flag as error'

STEP 2
 Click on the 'Delete' button

New feature
 The 'Delete' button appears only when the case note has a draft status and if the current user is the Creator of the case note.

Back Edit **Delete** Print Attach Flag as error

Figure 7-24, Delete a draft case note

After the case note is deleted, the system returns to the case notes search screen.

8 System-generated Case Notes

A system-generated case note is pre-populated with some system generated information, but the user has the ability to enter free-text. These case notes occur after certain events like a case closure, sent letters, or authorized SAR.

8.1 SAR CASE NOTES

Step 1. Create a pending SAR

Enter SAR

NACHO LIBRE, 3868101

STEP 1

Create a pending SAR

SEARCH MED

Required fields are marked in *

CLIENT INFORMATION

Client Name:	NACHO LIBRE	FIR Elig:	ELIGIBLE	Reg Status:	CLOSED
Alias:		Med Elig Status:	ELIGIBLE	Application Status:	2ND LETTER SENT
CCS Number:	3868101	Diagnostic Only:	NO	PSA Status:	PENDING
Date of Birth:	01/01/2007	CCS Elig Status:	9K CCS	Program Begin Date:	01/01/2008
CIB:	32481471A0	County:	SACRAMENTO	Program End Date:	07/01/2008
Gender:	FEMALE				

PROVIDER INFORMATION

Provider Name:	COOK, AARON C MD		Provider Number:	1174601850	
Provider Type:	PHYSICIAN		Address 2:		
Address 1:	<input type="text" value="2025 MORSE AVE"/>		Address 2:	<input type="text"/>	
City:	<input type="text" value="SACRAMENTO"/>		County:	<input type="text" value="Sacramento"/>	
State:	<input type="text" value="CA"/>		Zip:	<input type="text" value="95825"/>	
Phone No.:	<input type="text" value=""/> - <input type="text" value=""/> <input type="text" value=""/>		Panelled Non PMF Provider:	<input type="text"/>	

Change Provider

Edit Provider

SAR INFORMATION

SAR Number:			SAR Status:		
Service Begin Date:	<input type="text" value="01/01/2008"/>	Service End Date:	<input type="text" value="06/30/2008"/>		
Service Request Date:	<input type="text" value="01/01/2008"/>	Number of Days:	<input type="text"/>		
EPST-SS:	<input type="checkbox"/>	Category:	<input type="text" value="Select"/>		
CCS SS:	<input type="checkbox"/>	State Approved:	<input type="radio"/> Yes <input type="radio"/> No		
State Funded:	<input type="checkbox"/>				
Primary Diagnosis:	<input type="text" value="110.0 DERMATOPHYTOSIS OF SCALP AND BEARD"/>				
Secondary Diagnosis:	<input type="text" value="003.8 OTHER SPECIFIED SALMONELLA INFECTION"/>				

SERVICE CODE INFORMATION

Remove Service Code	Modifier	Type	Alternate Code	Service Description	Alternate Description	Units	Quantity	Amount
<input type="checkbox"/>	01	<div style="border: 1px solid #ccc; padding: 2px;">KC NU OE</div>	<input type="text"/>	PHYSICIAN	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

SPECIAL INSTRUCTIONS

Special Instructions

Add Services

Submit

Undo

Figure 8-25, Enter pending SAR

Figure 8-26 displays the automatic case notes screen that has the system generated information and an area for users to add additional free-text.

- Step 2.** Enter additional free-text information then click the 'Save' button. The system will save the case note and return to the SAR module. Navigate back to the Case Notes module and find the new automatic case note.

California Home | DHCS Home | DHCS Organization | Sunday, April 20, 2008

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Web Messages(0)

CCS Modules | Provider | Reports | Administration

Case Notes

Search Case Note | Add New | Edit/Delete

CASE NOTES

Required Fields are marked with *

CLIENT INFORMATION

Client Name:	NACHO LIBRE	F/R Elig:	ELIGIBLE	Reg Status:	CLOSED
CCS Number:	3868101	Med Elig Status:	ELIGIBLE	Application Status:	2ND LETTER SENT
DOB:	01/01/2007	Diagnostic Only:	NO	PSA Status:	SIGNATURE PENDING
CIN:	32481471A0	CCS Elig Status:	9K CCS	Program Begin Date:	01/01/2008
Gender:	FEMALE	County:	SACRAMENTO	Program End Date:	07/01/2008

CASE NOTE DETAILS

Entry Date: 04/20/2008

Subject: SAR-Pending | Service Authorization status: Pending

Details:

SAR #: 97011486390

Provider: COOK, AARON C MD

Service Begin Date: 01/01/2008

Service End Date: 06/30/2008

Comments: Enter my case notes free text here

STEP 2
Enter additional free-text information to the automatic case note then click the 'Save' button

Save | Continue

Figure 8-26, Automatic case note entry

Step 3. Select the system generated case note to view.

Step 4. Select the 'View/Print Selection' option then click the 'Continue' button

Case Notes

Search Case Note

Search Results - Case Notes

<input type="checkbox"/>	▲ Date ▼	Subject Code	Subject	▲ CCS# ▼	▲ Client Name ▼	▲ County ▼	▲ Entered By ▼	▲ Status ▼
<input type="checkbox"/>	11/05/2008	App-Letter1 Corres# 984852-2008	Application Status: 1st Letter: Sent Status: Sent	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	Misc	Test narrative entry date	T591749	Libre,Nacho	34	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 2nd Letter: Sent Status: Sent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	
<input type="checkbox"/>	10/06/2008	App-Letter2	Application Status: 2nd Letter: Sent		Libre,Nacho	33	Cardona Technician,Margarita	
<input type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Munky,Drunkn Curious	33	Paredes Ccs Supervisor,Caridad	
<input type="checkbox"/>	07/30/2008	SAR-Authorzd SAR# 97011486390	Service Authorization status: Authorized	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	

191 Records found, displaying 1 to 20.

[First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]

Back
Print
Attach
Transfer case note

STEP 1

Click on the subject description hyperlink

Figure 8-27, Select automatic case note to view

Figure 8-28 displays the system-generated case note. The free-text portion displays below the system-generated text.

The screenshot shows a web browser window with the URL <http://cmsdevw.cahwnet.gov/CMSDEV/CMSWebDriver?actionName=ViewCaseNotesAction&commandName=Vi>. The page displays case information for Libre, Nacho, including birth date (01/01/2008) and legal county (Orange). A timeline entry for 07/30/2008 at 10:00 AM shows a subject code of SAR-Pending and a description of Service Authorization status: Pending. The narrative section contains system-generated information such as SAR ID#, Provider ID, Provider name, and Service period. Below this is a free-text input area labeled 'Enter my case note free text here'.

Case Notes for:	Libre, Nacho	CCS #: T591748
Date Of Birth:	01/01/2008	Legal County: Orange
Date Range:	10/07/1998 - 11/06/2008	

07/30/2008 10:00 AM
Subject Code : SAR-Pending
Description : Service Authorization status: Pending
Entered by: Phavisith, Sone (Orange)

Narrative:
 SAR ID#: 97011486390
 Provider ID: 11746081850
 Provider name: Cook, Aaron C MD
 Service period: 01/01/2008—06/30/2008

Enter my case note free text here

Figure 8-28, Print display of automatic case note

8.1.1 SAR Hyperlinks

- Step 1.** Click the SAR hyperlink to view the pending SAR. In order to view the pending SAR, the system will have to navigate to the SAR module. A confirmation dialog box will appear.
- Step 2.** Click 'OK' to navigate to the SAR module.

Case Notes

Search Case Note

Search Results - Case Notes

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>	11/05/2008	App-Letter1 Corres# 984852-2008	Application Status: 1st Letter: Sent Status: Sent	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	Misc				34	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2				33	Cardona Technician,Margarita	
<input type="checkbox"/>	10/06/2008	App-Letter2				33	Cardona Technician,Margarita	
<input type="checkbox"/>	07/31/2008	Misc	complete	T591748	Libre,Nacho			
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Munky,Drunk			
<input type="checkbox"/>	07/30/2008	SAR-Pending SAR# 97011486390	Service Authorization status: Pending	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	

191 Records found, displaying 1 to 20.
First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]

STEP 1
Click SAR hyperlink to view the pending SAR. System will navigate to the SAR module.

STEP 2
Click 'OK' to continue to navigate to the SAR module to view the pending SAR.

Back Print Attach Transfer case note

Figure 8-29, Click SAR hyperlink to view pending SAR

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CCS Modules | Provider | Reports | Administration

View SAR

NACHO LIBRE, 3868101 PENDING, SAR ID 97011486390

Authorize Deny Cancel Modify Delete Print History

CLIENT INFORMATION

Client Name:	NACHO LIBRE	F/R Elig:	ELIGIBLE	Reg Status:	CLOSED
Alias:		Med Elig Status:	ELIGIBLE	Application Status:	2ND LETTER SENT
CCS Number:	3868101	Diagnostic Only:	NO	PSA Status:	SIGNATURE PENDING
DOB:	01/01/2007	CCS Elig Status:	9K CCS	Program Begin Date:	01/01/2008
CIH:	32481471A0	County:	SACRAMENTO	Program End Date:	07/01/2008
Gender:	FEMALE				

PROVIDER INFORMATION

Provider Name:	COOK, AARON C MD	Provider Number:	1174601850
Address:	2025 MORSE AVE,SACRAMENTO,CA,95825	County:	SACRAMENTO
Provider Type:	PHYSICIAN		

SAR INFORMATION

SAR Number:	97011486390	Request Date:	01/01/2008
Service Begin Date:	01/01/2008	Service End Date:	06/30/2008
No Of Days:	182	State Funded:	N
EPSDT-SS:	N	CCS-SS:	N
State Approved Category:			
Primary Diagnosis:	110.0 DERMATOPHYTOSIS OF SCALP AND BEARD		
Secondary Diagnosis:	003.8 OTHER SPECIFIED SALMONELLA INFECTIONS		

SERVICE REQUEST AUTHORIZATION

Service Code	Type	Modifier	Alternate Code	Service Description	Alternate Description	Units	Quantity	Amount
01				PHYSICIAN		1		

Figure 8-30, Navigate to SAR module to view pending SAR

Clicking on the hyperlink of a SAR with a status of authorized or cancelled, the system will display a pop-up screen of the .PDF format.

- Step 1.** Click the hyperlink of a SAR that has either an authorized or cancelled status. The system will bring up a print display of the selected SAR.

Case Notes

Search Case Note

Search Results - Case Notes

<input type="checkbox"/>	▲ Date ▼	Subject Code	Subject	▲ CCS# ▼	▲ Client Name ▼	▲ County ▼	▲ Entered By ▼	▲ Status ▼
<input type="checkbox"/>	11/05/2008	SAR-Authorzd SAR# 97016006630	Service Authorization status: Pending	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/05/2008	Misc	Test narrative entry data	T591749	Libre,Nacho	34	Phavisith,Sone	
<input type="checkbox"/>			in Status: 2nd	T591748	Libre,Nacho	33	Cardona Technician,Margarita	
<input type="checkbox"/>	10/06/2008	App-Letter2	Application Status: 2nd Letter sent	T591749	Munky,Drunkn Curious	33	Cardona Technician,Margarita	
<input type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Munky,Drunkn Curious	33	Paredes Ccs Supervisor,Caridad	
<input type="checkbox"/>	07/30/2008	SAR-Pending SAR# 97011486390	Service Authorization status: Pending	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	

191 Records found, displaying 1 to 20.

[First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]

Back
Print
Attach
Transfer case note

STEP 1

Click SAR hyperlink to view the authorized SAR.
A pop-up screen of the SAR appears.

Figure 8-31, Click SAR hyperlink to view PDF display

Figure 8-32 displays the authorized SAR.

https://cmstrnw.cahwnet.gov/CMSE47/PDFPrint?actionName=LetterAuthExtNewAction&csarid=97016006630 - M...

File Edit Go To Favorites Help

Google G Go Bookmarks Popups okay Check >> Settings

Find No current selection

SAR #: 97016006630

CONFIDENTIAL
CALIFORNIA CHILDREN'S SERVICES (CCS)
SRO-SACRAMENTO REGIONAL OFFICE
MS 8100
PO Box 597413
Sacramento, CA 95899-7413
TELEPHONE: (916) 327-3100

Authorized Provider: NGUYEN, CHAU TUAN MD
3291 LOMA VISTA RD
VENTURA CA 93003
Provider Type: PHYSICIAN
Provider Number: 1720160632
Telephone:

AUTHORIZATION FOR SERVICES
Authorization is for services and effective dates indicated below, in accordance with CCS program policies and fee schedule. Authorization for additional services not listed below must be requested in advance. By providing these authorized services, you agree to accept payment from the CCS program as payment in full. If you have a Service Code Grouping (SCG) authorization, please check your Medi-Cal manual for services included in the SCG.

CCS CLIENT INFORMATION

Client Name: NACHO LIBRE
Alias:
Address: 8008 JALAPENO AVE
APT 8
ORANGE, CA 92668
Parent/Guardian: MOM LIBRE
Address: 1515 K ST
SUITE 510
ORANGE, CA 92668
Medical Home: SURABIAN, S R INC
Address: 1221 W Tenaya
Fresno, CA 93711
County: ORANGE
Primary Diagnosis: 987.0 TOXIC EFFECT OF LIQUEFIED PETROLEUM GASES
Secondary Diagnosis:

Client Index Number: 30001381A2
CCS Case Number: 4059173
Date Of Birth: 01/01/2008
Gender: MALE
Client Telephone: (213) 698-4521
Parent/Guardian Tel: (213) 458-0874

AUTHORIZATION INFORMATION
Effective Dates: 01/01/2008 through 01/01/2008

CCS AUTHORIZED SERVICES

Service Code	Modifier	Service Description	Units	Amount
01		PHYSICIAN	1	

SPECIAL INSTRUCTIONS

Please refer to the Medi-cal website: www.medi-cal.ca.gov regarding billing instructions utilizing your National Provider Identifier (NPI).
Thank you for your continued participation in the California Children's Services Program.

Issued By: PHAVISITH SONE (SRO) Date Authorized: 11/19/2008
Page 1 of 1 Printed On: Wed Nov 19 13:03:40 PST 2008 SAR #: 97016006630

Figure 8-32, Print display of cancelled SAR

9 System Administration Functionalities

9.1 TRANSFER CASE NOTE

If users have entered a case note in the incorrect patient record, they can request to have a State system administrator transfer the case note to the correct patient.

- Step 1.** Select the case notes to transfer.
Step 2. Click on the 'Transfer case note' button.

Case Notes

Search Case Note

Search Results - Case Notes

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>	11/05/2008	SAR-Authorizd SAR# 97016006630	Service Authorization status: Pending	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	Misc	Test narrative entry date	T591749	Libre,Nacho	34	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 2nd Letter: Sent Status: Sent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 2nd Letter: sent	T591749	Munky,Drunkn Curious	33	Cardona Technician,Margarita	
<input checked="" type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	
<input checked="" type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	
<input checked="" type="checkbox"/>	07/30/2008	SAR-Pending SAR# 97011486390	Service Authorization status: Pending	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	

191 Records found, display [First/Prev] 1, 2, 3, 4, 5, 6, 7

STEP 1
Select the case notes to transfer.

STEP 2
Click the 'Transfer case note' button.

Back Print Attach Transfer case note

Figure 9-33, State system administrators functionalities

- Step 3.** Search and select the destination patient record.
- Step 4.** Enter the name of the user requesting to transfer the case note.
- Step 5.** Click the 'Transfer case note' button.

Case Notes

Search Case Note

Transfer Case Notes screen

Subject description is display only

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input checked="" type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	
<input checked="" type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	
<input checked="" type="checkbox"/>	07/30/2008	SAR-Pending SAR# 97011486390	Service Authorization status: Pending	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	

TRANSFER CASE NOTE TO:

Search Client

STEP 3
Select destination patient record

Patient Name	SSN	DOB	Gender	County
UZUMAKI,NARUTO	T591750	35541781A0	01/01/2008	MALE

STEP 4
Enter the name of the user requesting the transfer and any additional comments

Comments: *

*Comments are required when transferring

Per user from a Legal CCS county

STEP 5
Click the 'Transfer case note' button

Back Transfer case note

Figure 9-34, Transfer case note to correction patient record

After the case transfer is complete, the system returns to the case note search screen.

Step 6. Search for the transferred case notes of the destination patient record. Select the transferred case note to view as indicated by the status 'Transferred'.

Step 7. Click the 'Print' button.

Case Notes

Search Case Note

Search Results - Case Notes

STEP 6
Select the transferred case notes

			Subject	CCS#	Client Name	County	Entered By	Status
<input checked="" type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591750	Uzumaki, Naruto	33	Verzosa Oa, Karen	Transferred
<input checked="" type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591750	Uzumaki, Naruto	33	Paredes Ccs Supervisor, Caridad	Transferred
<input checked="" type="checkbox"/>	07/30/2008	SAR-Pending SAR# 97011486390	Service Authorization status Pending	T591750	Uzumaki, Naruto	33	Paredes Ccs Supervisor, Caridad	Transferred

STEP 7
Click the 'Print' button to view the transferred case notes

3 Records

Back Print Attach Transfer case note

Destination patient record

Figure 9-35, Select transferred case note to view

Figure 9-36 displays the format of the transferred case note. The transfer entry displays above the original case note with the date of when it was transferred. The original entry date is still used in searches.

http://cmsdevw.cahwnet.gov/CMS47DEV/CMSWebDriver?actionName=ViewCaseNotesAction&commandName=Vi - Microsoft Internet Explorer

Case Notes for: **Libre, Nacho** CCS #: T591748
 Date Of Birth: 01/01/2008 Legal County: Orange
 Date Range: 10/07/1998 - 11/06/2008

08/01/2008 1:00 PM Transferred Case Note Entered by: Phavisith, Sone (CMS-State)
 Narrative: Transferred from other patient
 Comments: Per user from Legal CCS county

07/31/2008 11:00 AM Entered by: Verzosa OA, Karen (Riverside)
 Subject Code : Misc
 Description : Renewal process complete
 Narrative:
 The renewal process has been completed when the medical reports where received—7/30/2008. Family has been notified and the welcome letter has been sent to the family. Financial and residential eligibility have been determined to be eligible.

08/01/2008 1:00 PM Transferred Case Note Entered by: Phavisith, Sone (CMS-State)
 Narrative: Transferred from other patient
 Comments: Per user from Legal CCS county

07/30/2008 8:38 AM Entered by: Parades, Caria (Riverside)
 Subject Code : Rpt-ChartRouted
 Description : Chart Routed
 Narrative:
 Patient has been adopted. The former name was Drunkn Munky, but after the adoption, family has renamed child to Nacho Libre. Case distribution by last name alpha will cause this case to be routed to another case management team.

Transfer case note entry

08/01/2008 1:00 PM Transferred Case Note Entered by: Phavisith, Sone (CMS-State)
 Narrative: Transferred from other patient
 Comments: Per user from Legal CCS county

07/30/2008 7:05 AM Entered by: Parades, Caria (Riverside)
 Subject Code : SAR-Pending
 Description : Service Authorization status: Pending
 Narrative:
 SAR ID#: 97011486390
 Provider ID: 11746081850
 Provider name: Cook, Aaron C MD
 Service period: 01/01/2008—06/30/2008

Original case note entry

Enter my case note free text here

Figure 9-36, View transferred case note

9.2 FLAG AS ERROR

Users need to request from the State system administrators to flag the case note as an error.

Step 1. Select the case note to flag as an error by clicking on the subject description hyperlink.

Case Notes								
Search Case Note								
Search Results - Case Notes								
<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>	11/05/2008		Authorization pending	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	Misc	Test narrative entry date	T591749	Libre,Nacho	34	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 2nd Letter: Sent Status: Sent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	
<input type="checkbox"/>	10/06/2008	App-Letter2	Application Status: 2nd Letter sent	T591749	Munky,Drunkn Curious	33	Cardona Technician,Margarita	
<input type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	
<input type="checkbox"/>	07/30/2008	SAR-Pending SAR# 97011486390	Service Authorization status: Pending	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	
7 Records found								
<input type="button" value="Back"/> <input type="button" value="Print"/> <input type="button" value="Attach"/> <input type="button" value="Transfer case note"/>								

Figure 9-37, Select case note to flag as error

- Step 2.** Enter comments or reasons for flagging the case note as an error.
- Step 3.** Click the 'Flag as error' button

Case Notes

Search Case Note

Case Notes

Required fields are marked in *

CLIENT INFORMATION

Client Name: NACHO LIBRE	F/R Elig:	Reg Status: PENDING
CCS Number: T591748	Med Elig Status:	Application Status: 1ST LETTER SENT
Date Of Birth: 01/01/2008	Diagnostic Onb:	PSA Status:
CNH: 39961381A2		Begin Date:
Gender: MALE		End Date:

Preview

Case Notes for: Libre,Nacho CCS #: T591748

Date Of Birth: 01/01/2008 Legal County: Orange

Date Range: 10/07/1998 - 11/06/2008

11/06/2008 10:00 AM

Subject Code : Misc

Description : Test narrative entry date Entered by: Phavisith, Sone (Orange)

Narrative:

Test testing the narrative entry date for this case note. Test testing the narrative entry date for this case note. This case note will be edited. The correction feature has been merged with the edit feature. The strikethrough format still displays for edits made to non-draft case notes.

STEP 2
Enter comments or reasons for flagging as error

**Comments are required when using 'Flag as error'*

Comments: *
Entered in error. Testing case notes only. This should not be in the patient record.

Back Edit Print Attach **Flag as error**

STEP 3
Click on the 'Flag as error' button

Figure 9-38, Enter comments prior to flagging the case note as error

After the case note is flagged as an error, the system returns to the case notes search screen.

Case notes flagged as an error will be excluded from the search results. To include case notes flagged as an error, place check mark in the 'Display error notes' check box under the Advanced Search options.

Advanced Search Options

(Combination of fields may be used, although not required)

Search User

<input type="checkbox"/> User Name	County	Regional Office	User Status	
<input type="text"/>	Select ▼	Select ▼	Select ▼	<input type="button" value="find >"/>

Select Subject

<input type="checkbox"/> Group Description	Subject Code	Subject Line	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="find >"/>

Display error and deleted case notes: ☒

Figure 9-39, Include error case notes in search results

9.3 PRINT ALL CASE NOTES IN A PATIENT RECORD

There is a known limitation where the system cannot return more than 200 records when searching for case notes. As a temporary solution, the system displays the 'Print all case notes' button to allow the system to display the PDF file of all the case notes for the selected patient.

Rules:

1. Used by County or State administrators; therefore, the button appears for only those users.
2. One patient record must be selected, only.
3. The PDF file lists the case notes in chronological order – oldest to newest.

Step 1. Select one patient record, only.

Step 2. Click the 'Print all case notes' button. The system displays a PDF file of all the case notes for the selected patient. The case notes are sorted in chronological order.

The screenshot shows the 'Case Notes' search interface. At the top, there's a 'Search Case Note' header. Below it, a 'Search - Case Notes' section contains a message: 'Required fields are marked in *. Patient or User is required.' Underneath is a section titled 'ENTER DATE RANGE AND TYPE' with 'Begin Date' (07/23/2008) and 'End Date' (11/05/2008) fields. Below that is a 'SEARCH FOR PATIENT' section. Under 'Search Client', there's a table with columns: Patient (checkbox), CII, SSN, DOB, Gender, and County. A 'find' button is to the right. The first row is selected, showing 'LIBRE, NACHO' with various identifiers. Below the table, there's an 'Advanced Search Options' section. At the bottom, there are four buttons: 'Add new case note', 'Search', 'Reset', and 'Print all case notes'. The 'Print all case notes' button is circled in red. Two callout boxes are present: 'STEP 1: Select a patient record' pointing to the first row of the table, and 'STEP 2: Click the 'Print all case notes' button' pointing to the circled button. A 'New feature' callout box states: 'As a work around for the 200+ record limitation, County or State admins can print all case note for a patient record'.

Figure 40, Use 'Print all case notes' button

10 Appendix A

Table 10-3, Proper Case Notes Subject Code usage

	Subject Code	Subject Description	Purpose of Use
1.	Elig-AnnualMedReview	Annual Medical Review	Documentation of Annual Review
2.	App-Misc	Application – other information or issues	Documentation regarding CCS application
3.	Misc-AppealIssue	Appeal Issues	Documentation of appeal actions - letter received and sent
4.	Elig-Appt	Appointment – FEI/FS Appointment	Documentation of financial/face sheet appt scheduled at the CCS Office
5.	SAR-BillClaim	Bill / Claim Communication	When CSC or PR speaks to provider or client about a bill or claim
6.	Misc-CaseNarr	Case Narrative	Used for general narrative entry
7.	Misc-CenterClinicVst	Center / Clinic Visit	Documentation of visit to center or clinic appointments
8.	Rpt-ChartRouted	Chart Routed	Used when hard copy chart routed to CCS staff
9.	Corresp-misc	Correspondence – other information or issues	Documentation of generated correspondence or received correspondence.
10.	SAR-CostEstRequest	Cost Estimate Request	Documentation of CER sent to vendor by CSC & MTU
11.	DME	Durable Medical Equipment (non-MTP)	Documentation of DME supplies
12.	DME-Rehabilitative	Durable Medical Equipment – Rehabilitative (non-MTP)	Documentation of DME-Rehab supplies (RX, estimates, appts, delivery)
13.	Elig-misc	Eligibility – other information or issues	Documentation of program or client eligibility
14.	Misc-EPSDTSS	EPSDT SS Issues	Entry of EPSDT requests sent
15.	RefReg-FaceSheetInterview	Face Sheet Interview	Documentation of face sheet interview by RN & CSC
16.	Elig-FinElig	Financial Eligibility	Documentation of all financial & residential eligibility - initial and annual
17.	Insur-misc	Insurance – other information or issues	Documentation of insurance findings, questions or issues
18.	Misc-InterofficeXfer	Interoffice Transfer	Used when case transferred to another county
19.	SAR-InpatientReview	Inpatient Review	Documentation of Inpatient Authorization set up by RN & MD
20.	Misc-Intrepreter	Language Interpreter	Documentation of Interpreters for face sheet and MTU appts by everyone
21.	Misc-MaintTransportation	Maintenance and Transportation	Documentation of approval of maintenance & transportation to MTC appts or MD appts
22.	Rpt-MedRptInfo	Medical Report Information	Used by medical staff to document/summarize info in medical report
23.	Elig-MedEligAction	Medical Eligibility Action	Documentation of medical eligibility determination
24.	Misc	Other information or issues	Documentation of e-mails, letters, faxes sent or received and

			other miscellaneous info
25.	Misc-PhoneCall	Phone Call	Documentation of a telephone call
26.	SAR-PerscriptionPharm	Prescription / Pharmacy	Document information related to prescription request
27.	SAR-ProviderInfo	Provider – information or issues	Documentation of a provider information or contact
28.	PSA-misc	PSA – other information or issues	Documentation of PSA tracking
29.	RefReg-ReferralInfo	Referral Information	Documentation of initial referral received
30.	LegacyAuth-Request	Request for Services	Documentation of authorization set up
31.	SAR-misc	Service Authorization (SAR) – other information or issues	Documentation specific to a client's SAR
32.	Xfer-misc	Transfer Information	Documentation of a client's transfer or any associated activities.
33.	Misc-TransitionPlan	Transition Planning	Used to indicated transition activities
34.	MTP-MedInfoComment	MTP Medical Information Comment	Comments related to diagnosis or treatment services
35.	MTP-ClientInfoComment	MTP Client Info Comment	Client registration comments
36.	MTP-SchoolInfoComment	MTP School Info Comment	Documentation of client's school for MTP services
37.	MTP-TherapyServComment	MTP Therapy Services Comment	Documentation for administration activities – therapy services (Not used for running notes)
38.	MTP-VendorTherapyComment	MTP Vendor Therapy Comment	Documentation for administration activities –vendor therapy services (Not used for running notes)
39.	MTP-DMEComment	MTP Durable Medical Equipment Comment	Documentation of MTP DME supplies
40.	MTP-ReferralInfoComment	MTP Referral Information Comment	Documentation of initial MTP referral received
41.	MTP-CaseStatusComment	MTP Case Status Comment	Documentation of case status updates
42.	MTP-ConsentTrackingComment	MTP Consent Tracking Comment	Used to track MTP consents
43.	MTP-MTUAssignComment	MTU Assignment Comment	Document when a new MTU is assigned
44.	MTP-ConferenceSchedComment	MTP Conference Scheduling	Conference scheduling updates or additions comments
45.	MTP-MTUClinic	MTU Clinic	Documentation of MTU clinic appts outcomes (orders, referrals, RX, etc)
46.	MTP-MTUTherapyRpt	MTU Therapy Reports	Documentation of annual or 6 month eval reports
47.	MTP-MTUIssues	MTU Issues	Documentation of MTU issues
48.	MTP-MTPElig	MTU Eligibility	Comments related to Client's MTP eligibility
49.	MTP-LocalEduAgency	Local Education Agency	Documentation of LEA activity by MTU
50.	MTP-MTPElig	MTP Eligibility	Documentation of MTU eligibility determination
51.	MTP-misc	MTP - other information or issues	Documentation of MTP e-mails, letters, faxes sent or received and other miscellaneous info
52.	MTP-miscMTU	MTU - other information or issues	Documentation of MTU e-mails, letters, faxes sent or received and other miscellaneous info
53.	MTP-MTUClinic	MTU Clinic	Conference scheduling within a MTU updates or additions

			comments.
54.	MTP-MTUIssues	MTU Issues	Documentation of general narrative entries related to MTU
55.	MTP-MTUTherapyRpt	MTU Therapy Reports	Documentation based on the MTU therapy report.